Virginia Information Technologies Agency

Physical IT Asset Inventory System Introduction

April 6, 2004

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Virginia Information Technologies Agency

Table of Contents

I. VITA Physical IT Asset Inventory Introduction 1

1. Asset Data Update Process 1
2. Asset Data Update Due Dates 1
   - 2.1 Medium Agencies & VDOT: 1
   - 2.2 Large Agencies: 1
   - 2.3 VITA Support Groups (Once agencies have transitioned): 1
3. VITA Physical IT Asset Inventory System Overview 1

II. System Functionality 1

1. System Functionality Overview: 1
2. Log On Procedure 1
   - 2.1 VITA Pegasus Account 1

I. VITA Physical IT Asset Inventory Introduction

On July 1, 2004, all medium agency and VDOT IT assets that are in scope to VITA, including hardware and software, will be transferred to VITA ownership. Large agency IT assets will be transferring at transition.

To ensure a smooth transition and enable ongoing maintenance and support, accurate billing and financial information, and future consolidation and Transformation planning activities, updating existing asset information is crucial. VITA seeks your assistance in updating the VITA Physical IT Asset Inventory System.

The system will contain comprehensive asset information for each agency, and will feature a user-friendly Web interface to simplify the updating and uploading processes.

1. Asset Data Update Process

Agencies will be require to provide list of staff authorized access to update their agency data in the Asset Inventory System. Once provided, authorized users may request access per instructions below.

Authorization lists are due by August 1, 2004. Requests for Asset Inventory Access must be complete by August 16, 2004

Agencies will be required to update their asset inventory data in one of the following three ways:

1. Update agency inventory data directly through the user-friendly Web interface to the VITA Physical IT Asset Inventory System. Agencies will be provided an agency spreadsheet populated with assets in asset portfolio. This system staging area has also been preloaded with your agency asset spreadsheets.
2. Update your agency spreadsheets and upload them to the VITA Physical IT Asset Inventory System.
3. Upload the two electronic file feeds for the update of Agency inventory data using the required data layout and formats (one for hardware and one for software).

2. Asset Data Update Due Dates

2.1 Medium Agencies & VDOT:

System access on April 5th, 2004.

All new spreadsheet or file uploads must be completed by May 1st, 2004.

All asset updates within the system must be completed by June 1st, 2004.

2.2 Large Agencies:

Authorization Lists are required by August 1, 2004

Asset Inventory User ID requests must be completed by August 16, 2004.

System availability is to be determined but no later than August 1st, 2004.

All new spreadsheet, file uploads, updates and production loads must be completed by date of transition.

2.3 VITA Support Groups (Once agencies have transitioned):

All assets need to be entered or updated in the VITA Physical IT Asset Inventory System within 48 hours of asset installation or update.

Small agency asset updates beginning April 5th, 2004.

Medium agency & VDOT asset updates beginning July 1st, 2004.

Large agency asset updates beginning at date of transition.

3. VITA Physical IT Asset Inventory System Overview

The VITA Physical IT Asset Inventory System is divided into two areas—a Staging database that will be populated with your agency's current asset data, and a Production database. Agencies may update their data within the Staging area, or choose to overlay the current data with a new file upload (i.e. update the spreadsheets and upload the updated spreadsheet data).

This system allows Agencies the ability to:

- Upload comma delimited electronic files (.csv or .txt) to the Staging Area
- View and update asset data within the Staging Area
- Move asset data into Production once the data has been finalized
- View and update asset data within the Production database

Agencies will be required to ensure their asset data meets all requirements prior the data being loaded into the production database. A "Staging Area" will be provided to the agencies to assist with the initial upload/validation process. After all data has been finalized in the Staging Area, Agencies may move their asset data into the Production Database. Once Agencies have successfully moved any data from the Staging Area into production, the system will not accept any additional file feeds. Data entry screens will be available for further updating of Asset Data.

Access to the Inventory Asset web application will be controlled to ensure authorized access to important agency data using the VITA Pegasus username and password.

All electronic asset files must conform to the attached File Layout, and all files must be comma delimited. Valid file types accepted will be:

- .csv (must adhere to file layout requirements, see attached Addendum A)

II. System Functionality

1. System Functionality Overview:

The VITA Physical IT Asset Inventory System allows you to:

- Upload your agency's updated excel spreadsheets or comma delimited electronic files (.csv). This will replace all of the current or preloaded asset data in the Staging Area.
- View and update asset data within the Staging Area.
- Move asset data into the Production Asset Inventory System once the data has been finalized.
- View and update asset data within the Production Area.

The system consists of three main areas:

1. Upload File Area

The upload area will enable the user to select a file for upload to the Staging Area. The user has the ability to view and verify that the correct file has been selected for upload. Instructions for file layout and how to convert a data file to the comma delimited (*.csv) format have been provided for the users reference.

2. Staging Area (Update Data)

The Staging Area is a temporary place outside of the production Asset Inventory System that allows you to update your data that you have uploaded. It will also allow you to individually add new software and hardware assets. From here, once you have ensured that your data is complete and accurate, you can authorize and move your data into the production Asset Inventory System.

3. Asset Inventory System (Production)

The Asset Inventory System is the production system which contains all physical IT assets. Once assets have been loaded into this system, you have the ability to maintain those assets, as well as insert new assets. Once data is moved into production, no new file uploads will be allowed.

2. Log On Procedure

Accessing the VITA Physical IT Asset Inventory System
A VITA Pegasus Account is required to access the VITA Physical IT Asset Inventory System. Once a VITA Pegasus Account has been established, and access to the VITA Physical IT Asset Inventory System has been granted, you will be able to log into the VITA Physical IT Asset Inventory System with your VITA Pegasus Account user ID and Password.

The steps below will guide you through the process for establishing your VITA Pegasus Account, receiving access to the VITA Physical IT Asset Inventory System, and how to log into the VITA Physical IT Asset Inventory System. Screen shots have been included to assist in the clarification of the instructions.

The VITA Physical IT Asset Inventory System log in page can be found at the following URL:
https://ssl01.vita.virginia.gov/assetinventory/

VITA Physical IT Asset Inventory System
Login Page

VITA Pegasus Account

Request Access to Asset Inventory Profile Manager Log into Asset Inventory Help

Welcome! You will need a VITA Pegasus account username and password to access the VITA Physical IT Asset Inventory System. Access to the VITA Physical IT Asset Inventory System Login Page is limited to customers and employees who have been granted special permission by their Agency or administrator.

The VITA Pegasus account provides a single user name and password to be used across all VITA web-based applications. However, individual application permissions must be obtained for each VITA Web Application being accessed.

- Request a VITA Pegasus Account

  If you do not have a VITA Pegasus account, you must request an account to the VITA Physical IT Asset Inventory System. By requesting a new account here, you will also be requesting access to the system. NOTE: Do not use this feature if you have forgotten your account.

- Request Access for an existing VITA Pegasus Account

  If you already have a VITA Pegasus account for another VITA application, you will need to login with your existing Pegasus Account information and confirm/update your user account information. This confirmation will serve as your request for access to the VITA Physical IT Asset Inventory System.

- Update Your VITA Pegasus Account with Pegasus Profile Manager

  Click here to log into the Pegasus Profile Manager and update your Pegasus Account. You can update your contact information and your password for your VITA Pegasus Account.

- Forgot your VITA Pegasus Account Password?

  Forgot your password? Click here to access Pegasus' secure and easy to use verification system for accessing your account and resetting your password.

- Forgot your VITA Pegasus Account UserName?

  If you have forgotten your username, you will need to contact the VCCC or the VITA helpdesk to reset your account.

Login to the VITA Physical IT Asset Inventory

- Login to the VITA Physical IT Asset Inventory

  You will need to enter your Pegasus Account user id and password in order to access the VITA Physical IT Asset Inventory.

Note: Your browser seems to support Javascript and it is enabled.

The VITA Physical IT Asset Inventory System is setup to be accessed by the following browsers:

- Netscape 6+
- Internet Explorer 6+

2.1 VITA Pegasus Account

The VITA IT Asset Inventory System Login Page provides options which allow the user to access the VITA Pegasus Account Application. The VITA Pegasus Account Application was developed for the purpose of managing the growing number of VITA user accounts and application privileges.

The VITA Pegasus account provides a single user name and password for use across all VITA web-based applications. However, individual application permissions must be obtained for each VITA Web Application being accessed. The VITA Pegasus Account Application provides the following user friendly enhancements:

- Account owners will be able to submit answers to predefined secret security questions that can be used to reset passwords without contacting the VITA Customer Care Center.
- Account owners will receive a reminder when their account password is nearing its expiration.
- Account owners will be able to maintain their own contact information.

Each link is defined below:

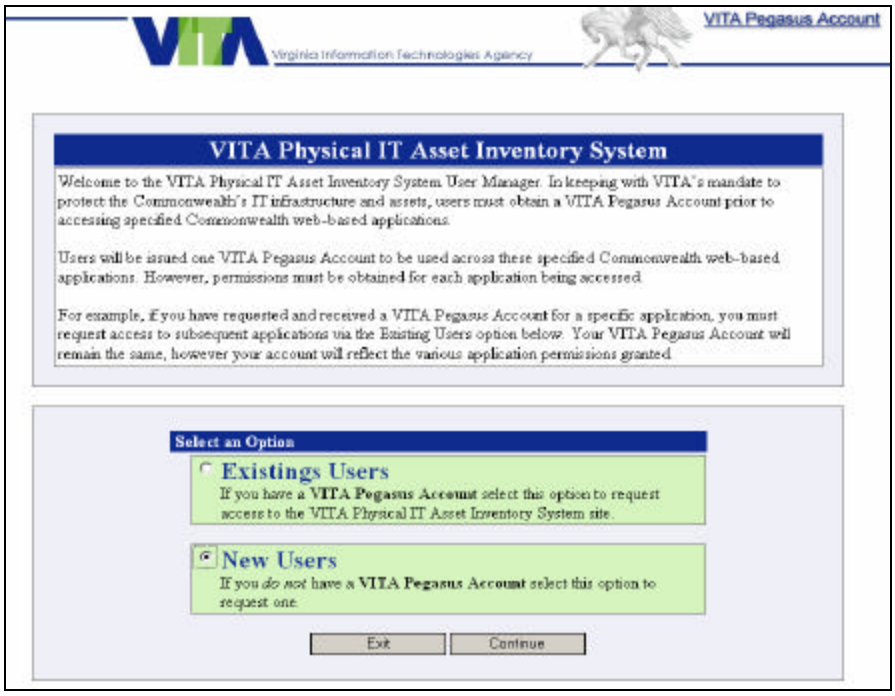
a) Request a VITA Pegasus Account

This option is to request a new VITA Pegasus Account only. If you already have a VITA Pegasus Account, do not use this option. If you do not have a VITA Pegasus Account, you may submit your request from here. Upon selecting this link you will be directed to the VITA Pegasus New user Account page (see screen below).

- Step 1:

  Select the "Request a VITA Pegasus Account" link from the VITA Physical IT Asset Inventory System Login Page.

  You will be directed to the VITA Pegasus Account page for the VITA Physical IT Asset Inventory System. See screen shot below:

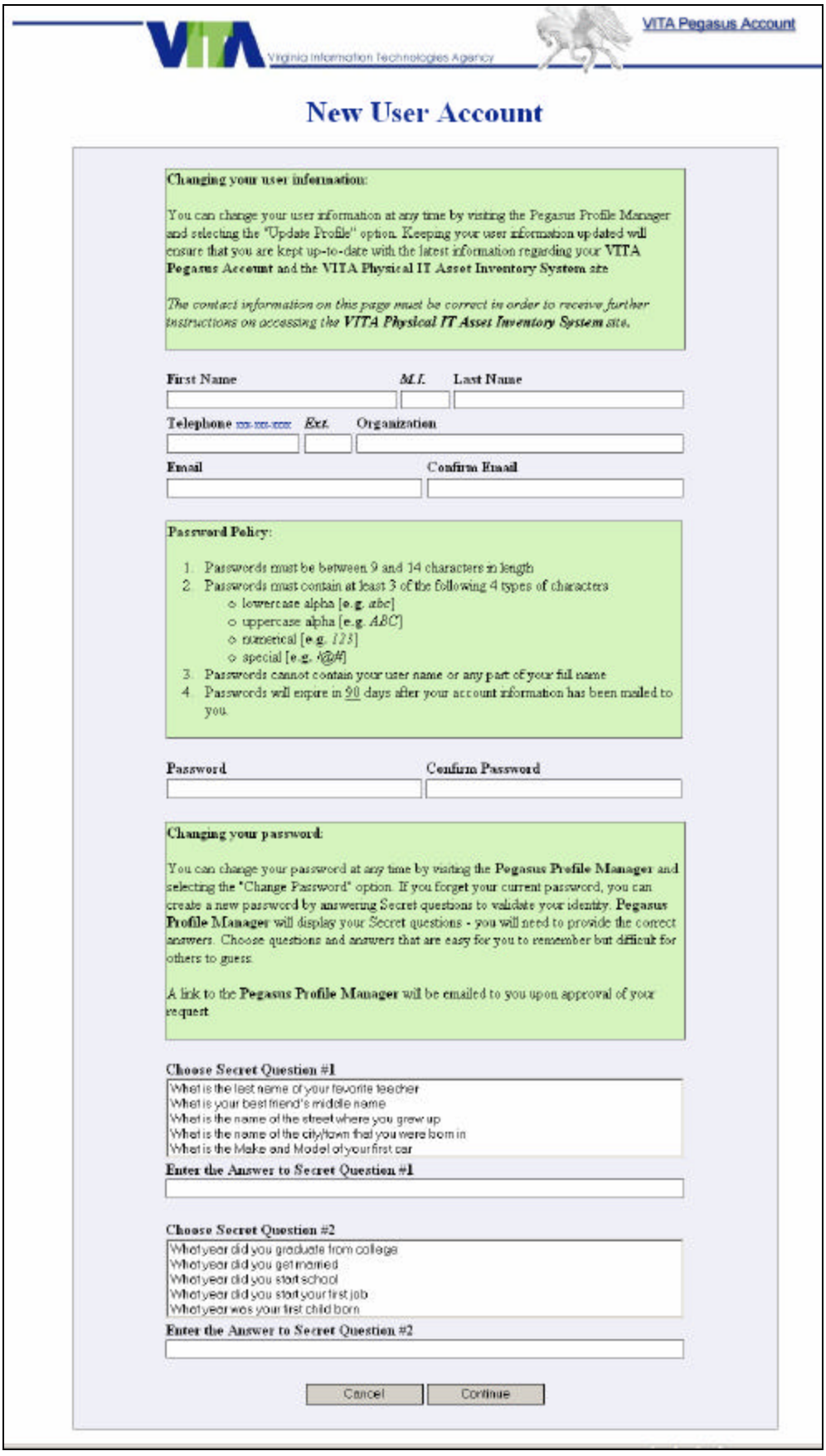


- Step 2:

  Select the “New Users” option.

  You will be directed to the “New user Account Page”. Here you will need to supply basic information such as your name, email address, create a password and answer two secret security questions. Please note, when creating a password, you must adhere to the following criteria:

  - Passwords must be between 9 and 14 characters in length.
  - Passwords must contain at least 3 of the following 4 types of characters.
    - lowercase alpha [e.g., abc]
    - uppercase alpha [e.g., ABC]
    - numerical [e.g., 123]
    - special [e.g., !@#]
  - Passwords cannot contain your user name or any part of your full name.
  - Passwords used previously will not be accepted.
  - Passwords will expire in 90 days.


VITA
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VITA Pegasus Account
New User Account
Changing your user information:
You can change your user information at any time by visiting the Pegasus Profile Manager and selecting the "Update Profile" option. Keeping your user information updated will ensure that you are kept up-to-date with the latest information regarding your VITA Pegasus Account and the VITA Physical IT Asset Inventory System site.
The contact information on this page must be correct in order to receive further instructions on accessing the VITA Physical IT Asset Inventory System site.
First Name
M.I.
Last Name
Telephone xxx-xxx-xxxx
Ext.
Organization
Email
Confirm Email
Password Policy:
1. Passwords must be between 9 and 14 characters in length
2. Passwords must contain at least 3 of the following 4 types of characters
lowercase alpha [e.g. abc]
uppercase alpha [e.g. ABC]
numerical [e.g. 123]
special [e.g. !@#]
3. Passwords cannot contain your user name or any part of your full name
4. Passwords will expire in 90 days after your account information has been mailed to you.
Password
Confirm Password
Changing your password:
You can change your password at any time by visiting the Pegasus Profile Manager and selecting the "Change Password" option. If you forget your current password, you can create a new password by answering Secret questions to validate your identity. Pegasus Profile Manager will display your Secret questions - you will need to provide the correct answers. Choose questions and answers that are easy for you to remember but difficult for others to guess.
A link to the Pegasus Profile Manager will be emailed to you upon approval of your request
Choose Secret Question #1
What is the last name of your favorite teacher
What is your best friend's middle name
What is the name of the street where you grew up
What is the name of the city/town that you were born in
What is the Make and Model of your first car
Enter the Answer to Secret Question #1
Choose Secret Question #2
What year did you graduate from college
What year did you get married
What year did you start school
What year did you start your first job
What year was your first child born
Enter the Answer to Secret Question #2
Cancel
Continue

- Step 3:

  Select the “Continue” button in order to submit your request for a VITA Pegasus Account.

  You will be contacted with your new VITA Pegasus user ID once your account has been activated. By submitting your request from this location, your VITA Pegasus Account will automatically be set up to provide access to the VITA IT Asset Inventory System.

b) <u>Request Access for an existing VITA Pegasus Account</u>

This option is for users who already have a VITA Pegasus Account, but do not yet have access to the VITA Physical IT Asset Inventory System. You will need to log in to your existing VITA Pegasus Account and Confirm/Update your user account information. By accessing your VITA Pegasus Account from this location, your VITA Pegasus Account will automatically be set up to provide access to the VITA IT Asset Inventory System.

- Step 1:

  Select the Request Access for an existing VITA Pegasus Account link from the VITA Physical IT Asset Inventory System Login Page.

  You will be directed to the VITA Pegasus Account page for the VITA Physical IT Asset Inventory System. See screen shot below:

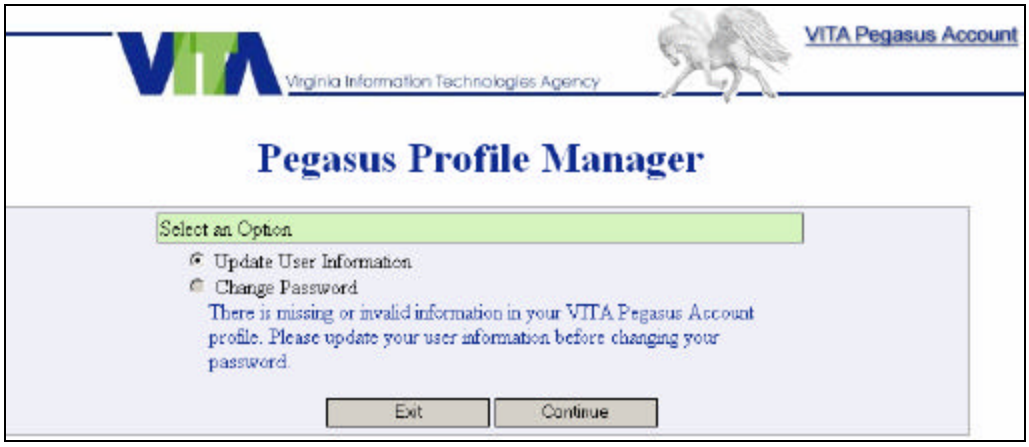
- Step 2:

  Select the “Existing user s” option and click the “Continue” button. A window will pop up that will request your Pegasus user Name and Password.

- Step 3:

  Enter your Pegasus user Name and Password and hit “Enter”. This will log you into the VITA Pegasus Account Management Application.

  After completing the login, you will be presented with the Pegasus Profile Manager screen. See screen shot below:



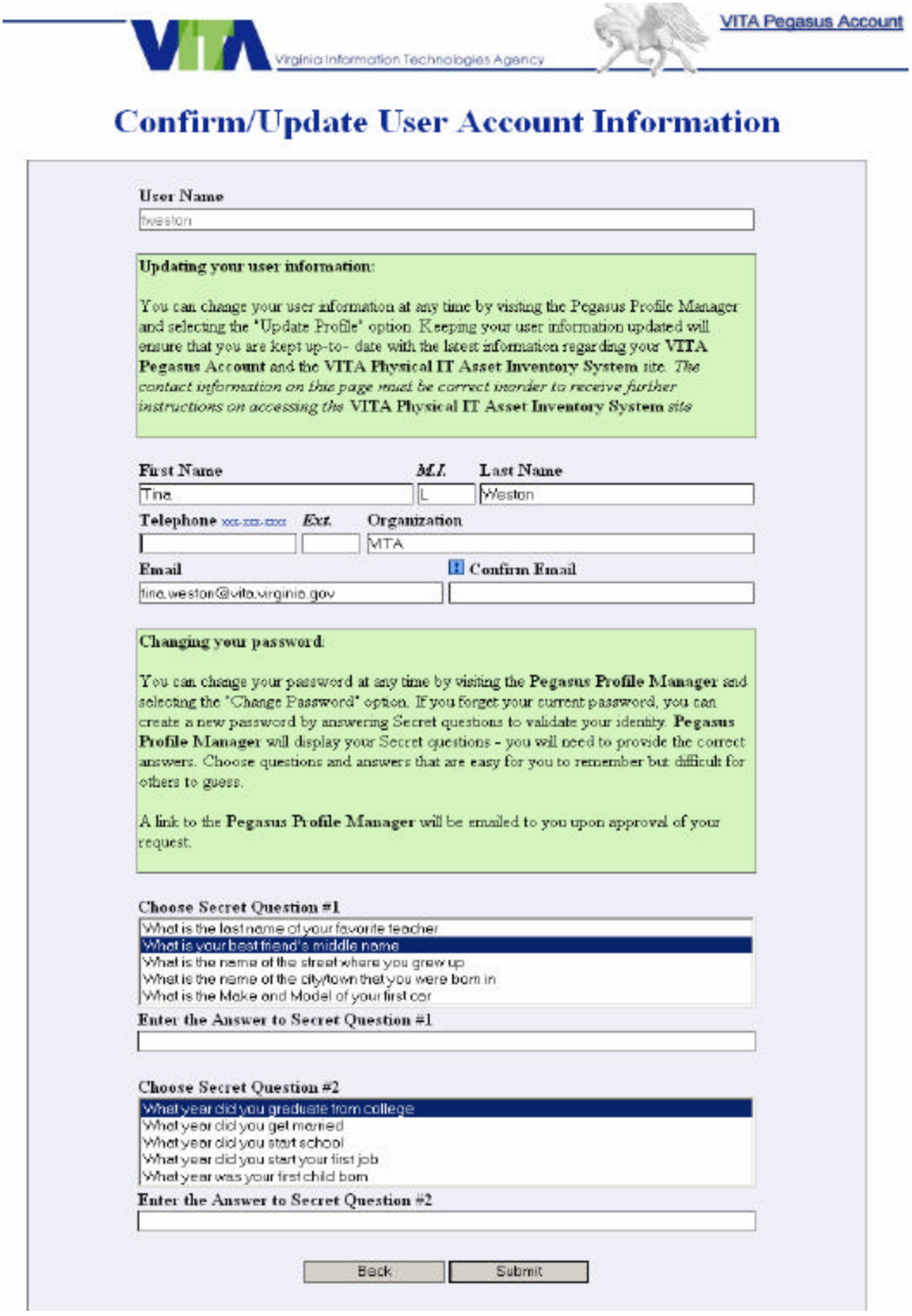
- Step 4:

  Select the “Update user Information” option and click the “Continue” button.

  If you receive a message that states “There is missing or invalid information in your VITA Pegasus Account profile. Please update your user information before changing your password.” this is normal and expected. It simply means that you have not

completed the process for requesting access to the VITA Physical IT Asset Inventory System. It is important that you select the "Update user Information" option before you try to change your password.

After selecting the "Update user Information" option and clicking the "Continue" button, you will be directed to the "Confirm/Update user Account Information" page.



- Step 5:

  Confirm your information is complete and accurate, enter your email address in the "Confirm Email" field, and click the "Submit" button.

  You will be contacted via email once your VITA Pegasus Account has been set up to access the VITA IT Asset Inventory System. By updating and submitting your request from this location, your VITA Pegasus Account will automatically be set up to provide access to the VITA IT Asset Inventory System.

c) Update your VITA Pegasus Account

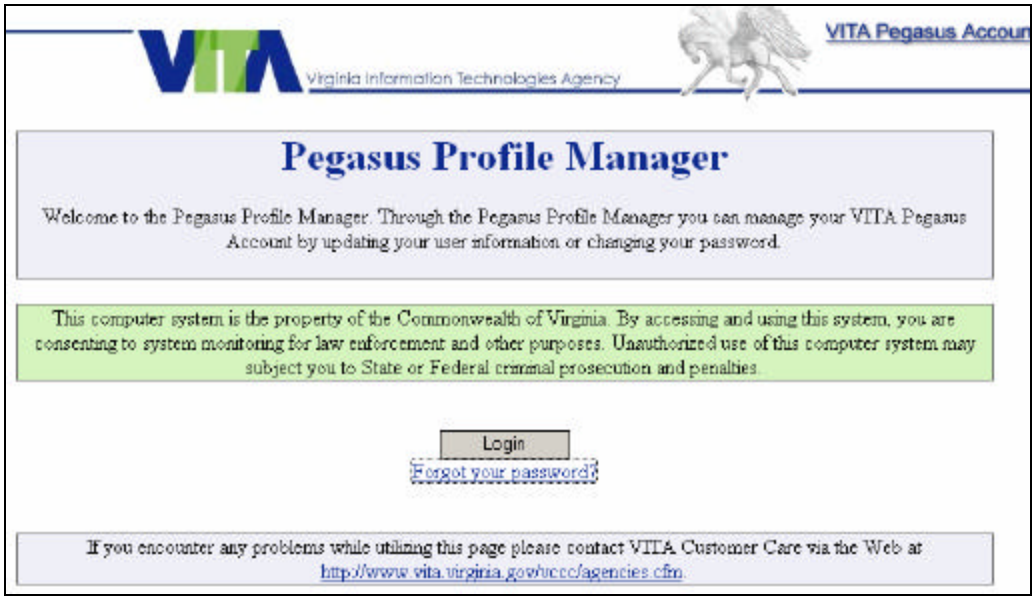
This option is for users who already have a VITA Pegasus Account, and already have access to the VITA Physical IT Asset Inventory System.

From here you are able to update your contact information, change your secret security questions and reset your password.

- Step 1:

  Select the ***Update your VITA Pegasus Account*** link from the VITA Physical IT Asset Inventory System Login Page.

  You will be directed to the Pegasus Profile Manager page of the VITA Pegasus Account Application. See screen shot below:



- Step 2:

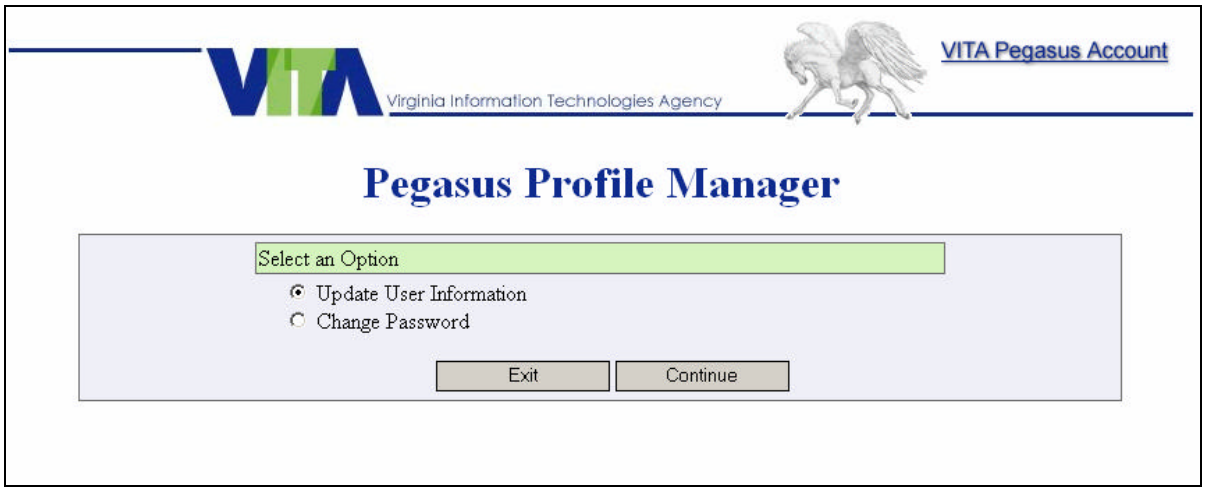
  Select the "Login" option.

  A window will pop up that will request your Pegasus user Name and Password.

- Step 3:

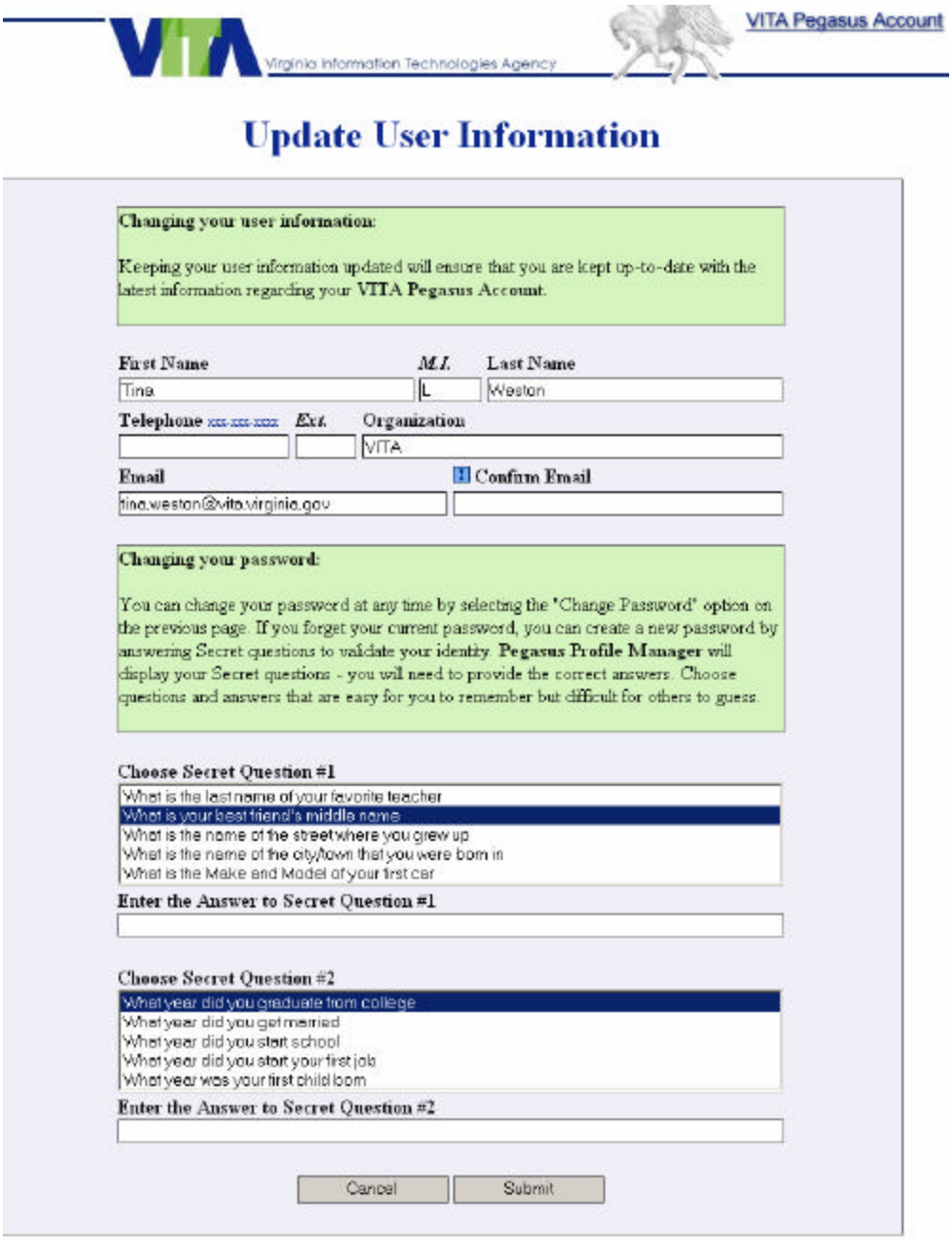
  Enter your Pegasus user Name and Password and hit “Enter”. This will log you into the VITA Pegasus Account Management Application.

  After completing the login, you will be presented with the Pegasus Profile Manager screen. See screen shot below:



- Step 4:

  Select the “Update user Information” option and click the “Continue” button. You will be directed to the “Update user Account Information” page.



- Step 5:

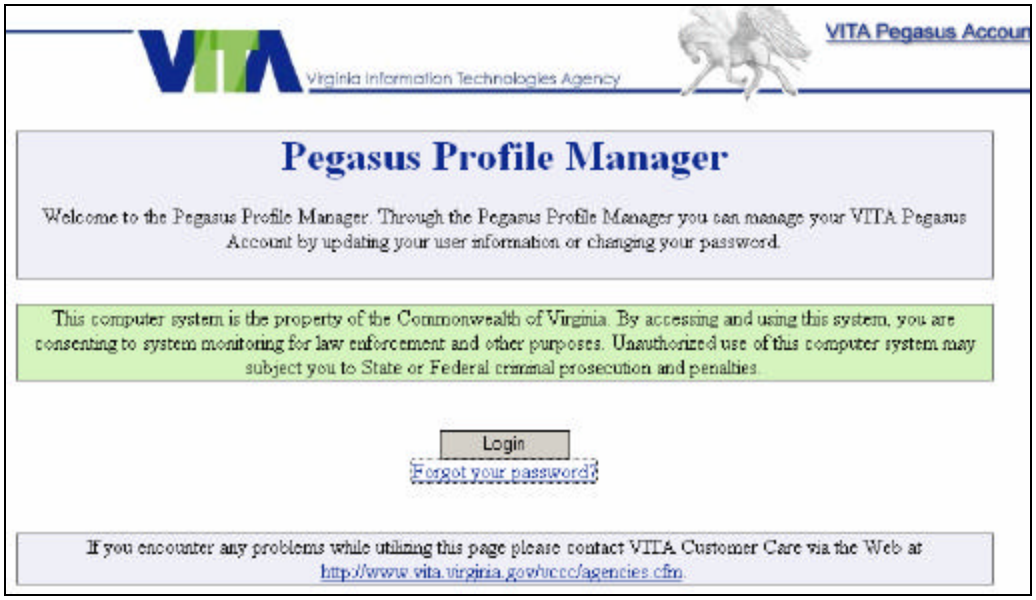
  Enter any necessary changes to your profile data, enter your email address in the "Confirm Email" field, and click the "Submit" button.

d) Forgot your VITA Pegasus Account Password?

This option is for users who already have a VITA Pegasus Account, have access to the VITA Physical IT Asset Inventory System, but forgot their password.

- Step 1: Select the ***Forgot your VITA Pegasus Account Password?*** link from the VITA Physical IT Asset Inventory System Login Page.

  You will be directed to the Pegasus Profile Manager page of the VITA Pegasus Account Application. See screen shot below:

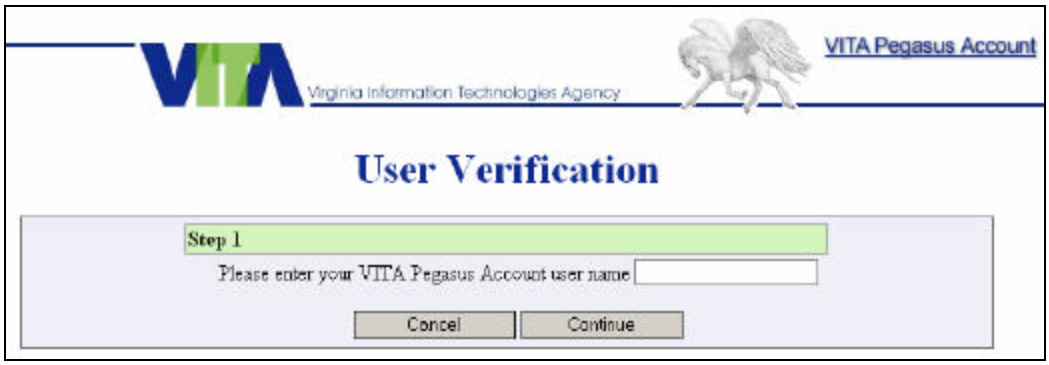


- Step 2: Select the "Forgot your password?" option. You will be directed to the "user Verification" screen.

- Step 3: Select the "If you do not have your verification code, select this option to request one and start the verification process" and select the "Continue" button.

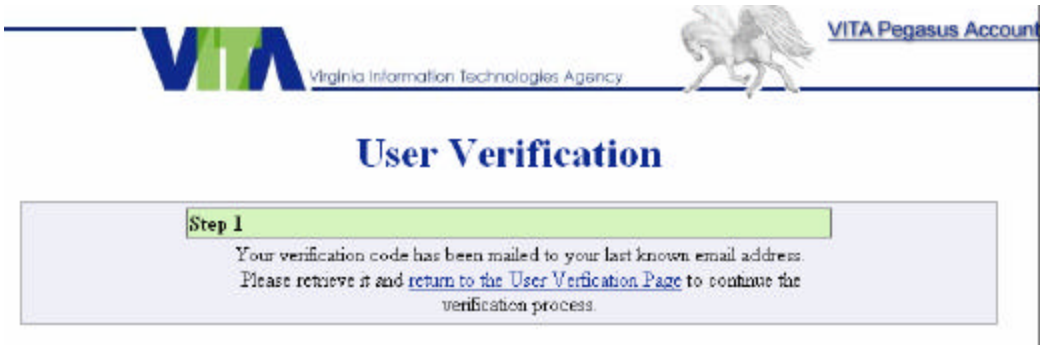
  This allows VITA to verify your identification.

  After selecting the "Continue" button, you will be presented with the "user Verification" screen. See screen shot below:



- Step 4: Enter your VITA Pegasus Account user name and select the "Continue" button.

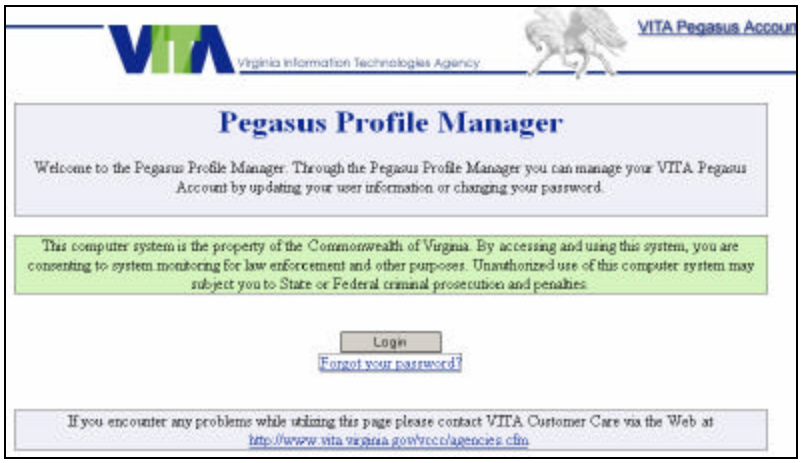
  You will receive a message stating that your Verification Number will arrive by email.



  Once you have received your Verification Number, you are ready to resume with Step 5.

- Step 5: Select the ***Forgot your VITA Pegasus Account Password?*** link from the VITA Physical IT Asset Inventory System Login Page.

  You will be directed to the Pegasus Profile Manager page of the VITA Pegasus Account Application. See screen shot below:



- Step 6: Select the “Forgot your password?” option.

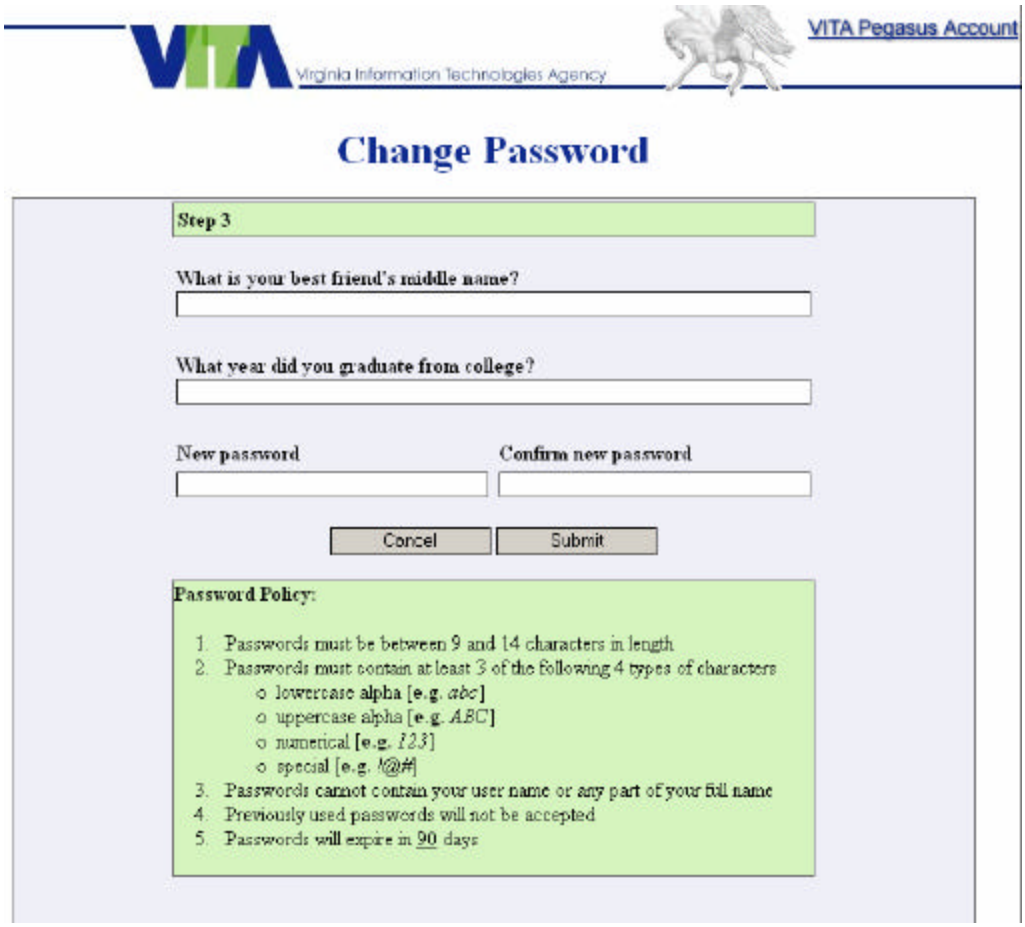
  You will be directed to the “user Verification” screen.

- Step 7: Select the “If you have already retrieved your verification code, select this option to continue the verification process” and select the “Continue” button.

  After selecting the “Continue” button, you will be presented with the “user Verification” screen. See screen shot below:

- Step 8: Enter your VITA Pegasus Account user name and enter the Verification Code you received in your email and select the “Continue” button.

  You will be directed to the “Change Password” screen.



- Step 9: Enter in the answers to your two Secret Security questions. You will need to create a new password, and retype that password for confirmation. When you are finished, click the "Submit" button.

  Please note, when creating a password, you must adhere to the following criteria:

  - Passwords must be between 9 and 14 characters in length.
  - Passwords must contain at least 3 of the following 4 types of characters.
    - lowercase alpha [e.g., abc]
    - uppercase alpha [e.g., ABC]
    - numerical [e.g., 123]
    - special [e.g., !@#]
  - Passwords cannot contain your user name or any part of your full name.
  - Passwords used previously will not be accepted.
  - Passwords will expire in 90 days.

After clicking the "Submit" button, if you have correctly answered your two Secret Security questions and adhered to the password requirements, you will receive the following success window:

Click the "Return to Main Page" link in order to exit this window.

e) Forgot your VITA Pegasus Account user Name?

This option is for users who already have a VITA Pegasus Account, have access to the VITA Physical IT Asset Inventory System, but have forgotten their VITA Pegasus Account user Name.

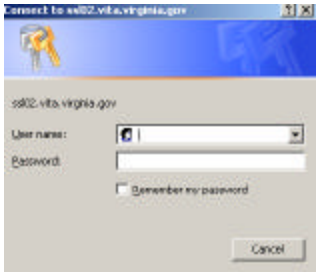
- Step 1: Select the ***Forgot your VITA Pegasus Account user Name?*** link from the VITA Physical IT Asset Inventory System Login Page.

  You will be directed to the VITA Customer Care Center where you will be able to log a ticket with the VITA Customer Care Center Service Desk.

1. VITA Physical IT Asset Inventory System

In order to log into the VITA IT Asset Inventory System, you must have already obtained a VITA Pegasus Account and received access to the IT Asset Inventory System.

- Step 1: Select the ***Login to the VITA Physical IT Asset Inventory*** link. A window will pop up that will request your Pegasus user Name and Password.



- Step 2: Enter your Pegasus user Name and Password and hit "Enter". This will log you into the VITA Physical IT Asset Inventory System. You will be directed to the VITA Physical IT Asset Inventory System home page.